Automated Time, Attendance and Production System (ATAAPS)

Team and Roster Management Deskguide

The primary use of the Team and Roster Management modules is to move <u>existing</u> employees into a new team and/or certification roster. Please note that when an existing employee is added to a new team, he or she is subsequently closed out of their former team. Therefore it is not necessary for the former timekeeper to remove the employee from their former team. The same is true when an employee is assigned to a new roster. In ATAAPS, teams and certification rosters are independent of one another. Because of this, if the employee's primary and/or alternate Certifying Officials changes as a result of the assignment to a new team, the employee's certification roster will also need to change.

The Team and Roster Management modules allow timekeepers to do the following in ATAAPS:

TEAM MANAGEMENT

1. Add a new team.

2. Add (assign) an existing employee to new or existing team.

3. Remove an existing employee from currently assigned team (removing separated employees from a team is not a function performed in Team Management, contact your Payroll Customer Service Representative (CSR) for assistance).

    a. Employees are closed to their existing team when moved to a new team.

    b. The close date is calculated as one day prior to the open date to the new team

4. View the team Supervisor and Timekeeper(s).

ROSTER MANAGEMENT

1. Add a new certification roster.

2. Assign an employee to a certification roster.

3. Remove an employee from their currently assigned certification roster.

    a. Employees are closed to their existing roster when moved to a new certification roster.

    b. The close date is calculated as one day prior to the open date to the new certification roster.

4. View the Primary and Alternate Certifying Officers for the selected certification roster.

TEAM MANAGEMENT

To add a new team:

Step 1. Click the **Team Management** link on the ATAAPS main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Click the **Add** button.

Step 4. Enter information in the fields on the Roster Add screen as follows:

- **Description.** *Required.* Enter the name of the new team (i.e. the six digit block/timekeeper code).

- **Open Date.** *Required.* Click the calendar icon to select the effective date (must be a pay period begin date) of the certification roster.

- **Pass to Accounting.** *Optional.* Place a check mark in this field if labor records for this team are to be passed to the interfacing accounting system.

- **Live Open Date.** *Required if Pass to Accounting checked*. The date this team becomes live. Labor records for this date, and all future dates, will be passed to the accounting system when the accounting upload process is performed.   If there are any labor records in the database containing a date prior to the live date, they will not be passed to the accounting system.

- **Live Close Date.** *Optional.* The date live labor records will no longer be passed to the accounting system.

- **Work Center.** *Required.* Teams must always be assigned to work centers, which are organizational structures, unique to each UIC. Use the drop down to display a list of work centers and select one.

- **Supervisor.** *Optional.* Use the drop down to display a list of employees that have been authorized Supervisor/Timekeeper Eligibility by the Database Administrator and select one. *The supervisor and timekeeper cannot be the same person.*

- **Timekeeper.** *Required.* Teams must always have an assigned timekeeper. Use the scroll bar to display a list of employees that have been authorized Supervisor/Timekeeper Eligibility by the Database Administrator and select one. *The supervisor and timekeeper cannot be the same person.*

Step 5. Click the **Save** button.

TEAM MANAGEMENT (CONT.)

To assign employees to a team:

Step 1. Click the **Team Management** link on the ATAAPS main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the team. Click the **Team** button.

Step 4. Click the **Employees** link.

Step 5. Click the **Assign** button.

Step 6. Select the pay period begin date for the employee assignment.

Step 7. A list of employees is presented. Select the desired employees. Use the scroll bar to view and select additional employees.

Please note that if the employee's name is not displayed on the employee list, the following may have occurred:

- The employee has been closed in Personnel Management.
  Contact your Payroll CSR for assistance.
- The employee has labor recorded (current or future).
  The employee's labor records will need to be deleted by their former timekeeper.
- The employee has default or favorites settings in effect for current or future pay periods.
  The employee's default and/or favorites settings will need to be "turned off" and deleted by their former timekeeper.
- The employee has a future team assignment.
  The future team assignment will need to be deleted by their former timekeeper.

Step 8. Click the **Save** button.

Step 9. Review the team assignments.

If the employee's new team has a different primary and/or alternate certifying official, the employee's roster will need to be changed. See Roster Management for assistance.

TEAM MANAGEMENT (CONT.)

To display the team supervisor:

Step 1. Click the **Team Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the desired team. Click the **Team** button.

Step 4. Click the **Supervisor** link.

Step 5. View the supervisor. Since this is an optional field, there may not a supervisor listed.

To display the team timekeepers:

Step 1. Click the **Team Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the desired team. Click the **Team** button.

Step 4. Click the **Timekeeper** link.

Step 5. View the timekeeper (s).

ROSTER MANAGEMENT

To add a new certification roster:

Step 1. Click the **Roster Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Click the **Add** button.

Step 4. Enter information in the fields on the Roster Add screen as follows:

- **Description.** *Required*. The name (or description) of the new certification roster.

- **Open Date.** *Required*. Click the calendar icon to select the effective date (must be a pay period begin date) of the certification roster.

- **Reports to Payroll.** *Optional.* Place a check mark in this field if time and attendance records for this roster are to be passed to the interfacing payroll system.

- **Live Open Date.** *Required if Reports to Payroll checked*. The date this certification roster becomes live. Time and attendance records for this date, and all future dates, will be passed to the payroll system when the payroll upload process is performed. If there are any time and attendance records in the database containing a date prior to the live date, they will not be passed to the payroll system.

- **Live Close Date.** *Optional.* The date time and attendance records will no longer be passed to the payroll system.

- **Primary Certifier.** *Required.* Rosters must always have an assigned certifier. Use the drop down to display a list of employees that have been authorized Certifier/Alternate Certifier Eligibility by the Database Administrator and select one.

- **Alternate Certifiers.** *Optional.* Use the scroll bar to select one or more alternate certifiers from the displayed list of employees that have been authorized Certifier/Alternate Certifier Eligibility by the Database Administrator. If you are assigning more than one alternate certifier, hold down the Ctrl key while you select the employees.

Step 5. Click the **Save** button.

ROSTER MANAGEMENT (CONT.)

To assign employees to a certification roster:

Step 1. Click the **Roster Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the roster. Click the **Roster** button.

Step 4. Click the **Employees** link.

Step 5. Click the **Assign** button.

Step 6. Select the pay period begin date for the employee assignment.

Step 7. A list of employees is presented. Select the desired employees. Use the scroll bar to view and select additional employees.

Step 8. Click the **Save** button.

Step 9. Review the certification roster assignments.

ROSTER MANAGEMENT (CONT.)

To display the primary certifier for a certification roster:

Step 1. Click the **Roster Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the desired certification roster. Click the **Roster** button.

Step 4. Click the **Primary Certifier** link.

Step 5. View the primary certifier

To display the alternate certifiers for a certification roster:

Step 1. Click the **Roster Management** link on the main menu.

Step 2. Ensure that the appropriate UIC is active. If not, go back and select the active UIC by:

Step 2.1. Click the **Change UIC** link on the Main Menu. If the link is disabled (grayed out), you are not authorized access to any UICs other than your default UIC. Contact your Payroll CSR for assistance.

Step 2.2. Select the UIC to make active.

Step 2.3. Click the OK button to make the selected UIC active.

Step 3. Use the drop down to locate and select the desired certification roster. Click the **Roster** button.

Step 4. Click the **Alternate Certifier** link.

Step 5. View the displayed list of alternate certifiers.